

Field Of The Invention

A PERSONALIZED PRODUCT REPORT

Field Of The Invention

5 The present invention relates to agent based systems and more particularly to an agent based system for providing a user interface that facilitates tuning of the user experience to the personal intentions of a particular user.

Agent based technology has become increasingly important for use with applications designed to interact with a user for performing various computer based tasks in foreground and background modes. Agent software comprises computer programs that are set on behalf of users to perform routine, tedious and time-consuming tasks. To be useful to an individual user, an agent must be personalized to the individual user's goals, habits and preferences. Thus, there exists a substantial requirement for the agent to efficiently and effectively acquire user-specific knowledge from the user and utilize it to perform tasks on behalf of the user.

The concept of agency, or the user of agents, is well established. An agent is a person authorized by another person, typically referred to as a principal, to act on behalf of the principal. In this manner the principal empowers the agent to perform any of the tasks that the principal is unwilling or unable to perform. For example, an insurance agent may handle all of the insurance requirements for a principal, or a talent agent may act on behalf of a performer to arrange concert dates.

25 With the advent of the computer, a new domain for employing agents has arrived.
Significant advances in the realm of expert systems enable computer programs to act on

behalf of computer users to perform routine, tedious and other time-consuming tasks. These computer programs are referred to as "software agents."

Moreover, there has been a recent proliferation of computer and communication
5 networks. These networks permit a user to access vast amounts of information and
services without, essentially, any geographical boundaries. Thus, a software agent has a
rich environment to perform a large number of tasks on behalf of a user. For example, it
is now possible for an agent to make an airline reservation, purchase the ticket, and have
the ticket delivered directly to a user. Similarly, an agent could scan the Internet and
10 obtain information ranging from the latest sports or news to a particular graduate thesis in
applied physics. Current solutions fail to apply agent technology to existing calendar
technology to provide targeted acquisition of background information for a user's
upcoming events.

15 SUMMARY OF THE INVENTION

According to a broad aspect of a preferred embodiment of the invention, a user interface
is created which obtains user profile information from a database, gathers information
from one or more users regarding product characteristics, correlates the user responses,
performs statistical analysis of the user responses and presents the statistical analysis in a
20 user comprehensible manner. The system also stores statistical ratings in a database
correlated to a particular product or service. Ratings are provided to a user from the
database based on a particular product or service, and the database can be queried to
retrieve one or more user profiles that have rated a product of interest to the current user.

25 DESCRIPTION OF THE DRAWINGS

The foregoing and other objects, aspects and advantages are better understood from the following detailed description of a preferred embodiment of the invention with reference to the drawings, in which:

- 5 Figure 1 is a block diagram of a representative hardware environment in accordance with
a preferred embodiment;

Figure 2 is a flowchart of the system in accordance with a preferred embodiment;

- 10 Figure 3 is a flowchart of a parsing unit of the system in accordance with a preferred embodiment;

Figure 4 is a flowchart for pattern matching in accordance with a preferred embodiment;

- 15 Figures 5 is a flowchart for a search unit in accordance with a preferred embodiment;

Figure 6 is a flowchart for overall system processing in accordance with a preferred embodiment;

- 20 Figure 7 is a flowchart of topic processing in accordance with a preferred embodiment;

Figure 8 is a flowchart of meeting record processing in accordance with a preferred embodiment;

- 25 Figure 9 is a block diagram of process flow of a pocket bargain finder in accordance with a preferred embodiment;

Figure 10A and 10B are a block diagram and flowchart depicting the logic associated with creating a customized content web page in accordance with a preferred embodiment;

Figure 11 is a flowchart depicting the detailed logic associated with retrieving user-centric content in accordance with a preferred embodiment;

Figure 12 is a data model of a user profile in accordance with a preferred embodiment;

Figure 13 is a persona data model in accordance with a preferred embodiment;

Figure 14 is an intention data model in accordance with a preferred embodiment;

Figure 15 is a flowchart of the processing for generating an agent's current statistics in accordance with a preferred embodiment;

Figure 16 is a flowchart of the logic that determines the personalized product rating for a user in accordance with a preferred embodiment;

Figure 17 is a flowchart of the logic for accessing the centrally stored profile in accordance with a preferred embodiment;

Figure 18 is a flowchart of the interaction logic between a user and the integrator for a particular supplier in accordance with a preferred embodiment;

Figure 19 is a flowchart of the agent processing for generating a verbal summary in accordance with a preferred embodiment;

Figure 20 illustrates a display login in accordance with a preferred embodiment;

Figure 21 illustrates a managing daily logistics display in accordance with a preferred embodiment;

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Figure 22 illustrates a user main display in accordance with a preferred embodiment;

Figure 23 illustrates an agent interaction display in accordance with a preferred embodiment;

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Figure 24 is a block diagram of an active knowledge management system in accordance with a preferred embodiment;

Figure 25 is a block diagram of a back end server in accordance with a preferred embodiment; and

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Figure 26 is a block diagram of a magic wall in accordance with a preferred embodiment.

DETAILED DESCRIPTION

20 A preferred embodiment of a system in accordance with the present invention is preferably practiced in the context of a personal computer such as an IBM compatible personal computer, Apple Macintosh computer or UNIX based workstation. A representative hardware environment is depicted in Figure 1, which illustrates a typical hardware configuration of a workstation in accordance with a preferred embodiment
25 having a central processing unit 110, such as a microprocessor, and a number of other units interconnected via a system bus 112. The workstation shown in Figure 1 includes a Random Access Memory (RAM) 114, Read Only Memory (ROM) 116, an I/O adapter

communication network (e.g., a data processing network) and a display adapter 136 for connecting the bus 112 to a display device 138. The workstation typically has resident thereon an operating system such as the Microsoft Windows NT or Windows/95 Operating System (OS), the IBM OS/2 operating system, the MAC OS, or UNIX operating system. Those skilled in the art will appreciate that the present invention may also be implemented on platforms and operating systems other than those mentioned.

A preferred embodiment is written using JAVA, C, and the C++ language and utilizes object oriented programming methodology. Object oriented programming (OOP) has become increasingly used to develop complex applications. As OOP moves toward the mainstream of software design and development, various software solutions require adaptation to make use of the benefits of OOP. A need exists for these principles of OOP to be applied to a messaging interface of an electronic messaging system such that a set of OOP classes and objects for the messaging interface can be provided.

OOP is a process of developing computer software using objects, including the steps of analyzing the problem, designing the system, and constructing the program. An object is a software package that contains both data and a collection of related structures and procedures. Since it contains both data and a collection of structures and procedures, it
5 can be visualized as a self-sufficient component that does not require other additional structures, procedures or data to perform its specific task. OOP, therefore, views a computer program as a collection of largely autonomous components, called objects, each of which is responsible for a specific task. This concept of packaging data, structures, and procedures together in one component or module is called encapsulation.

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In general, OOP components are reusable software modules which present an interface that conforms to an object model and which are accessed at run-time through a component integration architecture. A component integration architecture is a set of architecture mechanisms which allow software modules in different process spaces to
15 utilize each others capabilities or functions. This is generally done by assuming a common component object model on which to build the architecture.

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It is worthwhile to differentiate between an object and a class of objects at this point. An object is a single instance of the class of objects, which is often just called a class. A class of objects can be viewed as a blueprint, from which many objects can be formed.

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OOP allows the programmer to create an object that is a part of another object. For example, the object representing a piston engine is said to have a composition-relationship with the object representing a piston. In reality, a piston engine comprises a piston, valves and many other components; the fact that a piston is an element of a piston engine can be logically and semantically represented in OOP by two objects.

OOP also allows creation of an object that “depends from” another object. If there are two objects, one representing a piston engine and the other representing a piston engine wherein the piston is made of ceramic, then the relationship between the two objects is not that of composition. A ceramic piston engine does not make up a piston engine.

5 Rather it is merely one kind of piston engine that has one more limitation than the piston engine; its piston is made of ceramic. In this case, the object representing the ceramic piston engine is called a derived object, and it inherits all of the aspects of the object representing the piston engine and adds further limitation or detail to it. The object representing the ceramic piston engine “depends from” the object representing the piston engine. The relationship between these objects is called inheritance.

10 When the object or class representing the ceramic piston engine inherits all of the aspects of the objects representing the piston engine, it inherits the thermal characteristics of a standard piston defined in the piston engine class. However, the ceramic piston engine object overrides these ceramic specific thermal characteristics, which are typically
15 different from those associated with a metal piston. It skips over the original and uses new functions related to ceramic pistons. Different kinds of piston engines have different characteristics, but may have the same underlying functions associated with it (e.g., how many pistons in the engine, ignition sequences, lubrication, etc.). To access each of these
20 functions in any piston engine object, a programmer would call the same functions with the same names, but each type of piston engine may have different/overriding implementations of functions behind the same name. This ability to hide different implementations of a function behind the same name is called polymorphism and it greatly simplifies communication among objects.

25 With the concepts of composition-relationship, encapsulation, inheritance and polymorphism, an object can represent just about anything in the real world. In fact, our

logical perception of the reality is the only limit on determining the kinds of things that can become objects in object-oriented software. Some typical categories are as follows:

- Objects can represent physical objects, such as automobiles in a traffic-flow simulation, electrical components in a circuit-design program, countries in an economics model, or aircraft in an air-traffic-control system.
- Objects can represent elements of the computer-user environment such as windows, menus or graphics objects.
- An object can represent an inventory, such as a personnel file or a table of the latitudes and longitudes of cities.
- An object can represent user-defined data types such as time, angles, and complex numbers, or points on the plane.

With this enormous capability of an object to represent just about any logically separable matters, OOP allows the software developer to design and implement a computer program that is a model of some aspects of reality, whether that reality is a physical entity, a process, a system, or a composition of matter. Since the object can represent anything, the software developer can create an object which can be used as a component in a larger software project in the future.

- If 90% of a new OOP software program consists of proven, existing components made from preexisting reusable objects, then only the remaining 10% of the new software project has to be written and tested from scratch. Since 90% already came from an inventory of extensively tested reusable objects, the potential domain from which an error could originate is 10% of the program. As a result, OOP enables software developers to build objects out of other, previously built, objects.

This process closely resembles complex machinery being built out of assemblies and sub-assemblies. OOP technology, therefore, makes software engineering more like hardware engineering in that software is built from existing components, which are available to the developer as objects. All this adds up to an improved quality of the software as well as
5 an increased speed of its development.

Programming languages are beginning to fully support the OOP principles, such as encapsulation, inheritance, polymorphism, and composition-relationship. With the advent of the C++ language, many commercial software developers have embraced OOP.

10 C++ is an OOP language that offers a fast, machine-executable code. Furthermore, C++ is suitable for both commercial-application and systems-programming projects. For now, C++ appears to be the most popular choice among many OOP programmers, but there is a host of other OOP languages, such as Smalltalk, common lisp object system (CLOS), and Eiffel. Additionally, OOP capabilities are being added to more traditional popular
15 computer programming languages such as Pascal.

The benefits of object classes can be summarized, as follows:

- *Objects* and their corresponding classes break down complex programming problems into many smaller, simpler problems.
- 20 • *Encapsulation* enforces data abstraction through the organization of data into small, independent objects that can communicate with each other. Encapsulation protects the data in an object from accidental damage, but allows other objects to interact with that data by calling the object's member functions and structures.
- *Subclassing* and inheritance make it possible to extend and modify objects
25 through deriving new kinds of objects from the standard classes available in the system. Thus, new capabilities are created without having to start from scratch.

- *Polymorphism* and multiple inheritance make it possible for different programmers to mix and match characteristics of many different classes and create specialized objects that can still work with related objects in predictable ways.
- 5 • *Class hierarchies* and containment hierarchies provide a flexible mechanism for modeling real-world objects and the relationships among them.
- *Libraries* of reusable classes are useful in many situations, but they also have some limitations. For example:
 - *Complexity.* In a complex system, the class hierarchies for related classes can
10 become extremely confusing, with many dozens or even hundreds of classes.
 - *Flow of control.* A program written with the aid of class libraries is still responsible for the flow of control (i.e., it must control the interactions among all the objects created from a particular library). The programmer has to decide which functions to call at what times for which kinds of objects.
- 15 • *Duplication of effort.* Although class libraries allow programmers to use and reuse many small pieces of code, each programmer puts those pieces together in a different way. Two different programmers can use the same set of class libraries to write two programs that do exactly the same thing but whose internal structure (i.e., design) may be quite different, depending on hundreds of small decisions
20 each programmer makes along the way. Inevitably, similar pieces of code end up doing similar things in slightly different ways and do not work as well together as they should.

Class libraries are very flexible. As programs grow more complex, more programmers
25 are forced to reinvent basic solutions to basic problems over and over again. A relatively new extension of the class library concept is to have a framework of class libraries. This

framework is more complex and consists of significant collections of collaborating classes that capture both the small scale patterns and major mechanisms that implement the common requirements and design in a specific application domain. They were first developed to free application programmers from the chores involved in displaying menus, windows, dialog boxes, and other standard user interface elements for personal computers.

Frameworks also represent a change in the way programmers think about the interaction between the code they write and code written by others. In the early days of procedural programming, the programmer called libraries provided by the operating system to perform certain tasks, but basically the program executed down the page from start to finish, and the programmer was solely responsible for the flow of control. This was appropriate for printing out paychecks, calculating a mathematical table, or solving other problems with a program that executed in just one way.

The development of graphical user interfaces began to turn this procedural programming arrangement inside out. These interfaces allow the user, rather than program logic, to drive the program and decide when certain actions should be performed. Today, most personal computer software accomplishes this by means of an event loop which monitors the mouse, keyboard, and other sources of external events and calls the appropriate parts of the programmer's code according to actions that the user performs. The programmer no longer determines the order in which events occur. Instead, a program is divided into separate pieces that are called at unpredictable times and in an unpredictable order. By relinquishing control in this way to users, the developer creates a program that is much easier to use. Nevertheless, individual pieces of the program written by the developer still call libraries provided by the operating system to accomplish certain tasks, and the

programmer must still determine the flow of control within each piece after being called by the event loop. Application code still “sits on top of” the system.

Even event loop programs require programmers to write a lot of code that should not
5 need to be written separately for every application. The concept of an application
framework carries the event loop concept further. Instead of dealing with all the nuts and
bolts of constructing basic menus, windows, and dialog boxes and then making these
things all work together, programmers using application frameworks start with working
application code and basic user interface elements in place. Subsequently, they build
10 from there by replacing some of the generic capabilities of the framework with the
specific capabilities of the intended application.

Application frameworks reduce the total amount of code that a programmer has to write
from scratch. However, because the framework is really a generic application that
15 displays windows, supports copy and paste, and so on, the programmer can also
relinquish control to a greater degree than event loop programs permit. The framework
code takes care of almost all event handling and flow of control, and the programmer’s
code is called only when the framework needs it (e.g., to create or manipulate a
proprietary data structure).

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A programmer writing a framework program not only relinquishes control to the user (as
is also true for event loop programs), but also relinquishes the detailed flow of control
within the program to the framework. This approach allows the creation of more
complex systems that work together in interesting ways, as opposed to isolated programs,
25 having custom code, being created over and over again for similar problems.

Thus, as is explained above, a framework basically is a collection of cooperating classes that make up a reusable design solution for a given problem domain. It typically includes objects that provide default behavior (e.g., for menus and windows), and programmers use it by inheriting some of that default behavior and overriding other behavior so that the framework calls application code at the appropriate times.

There are three main differences between frameworks and class libraries:

- *Behavior versus protocol.* Class libraries are essentially collections of behaviors that you can call when you want those individual behaviors in your program. A framework, on the other hand, provides not only behavior but also the protocol or set of rules that govern the ways in which behaviors can be combined, including rules for what a programmer is supposed to provide versus what the framework provides.
- *Call versus override.* With a class library, the code the programmer instantiates objects and calls their member functions. It's possible to instantiate and call objects in the same way with a framework (i.e., to treat the framework as a class library), but to take full advantage of a framework's reusable design, a programmer typically writes code that overrides and is called by the framework. The framework manages the flow of control among its objects. Writing a program involves dividing responsibilities among the various pieces of software that are called by the framework rather than specifying how the different pieces should work together.
- *Implementation versus design.* With class libraries, programmers reuse only implementations, whereas with frameworks, they reuse design. A framework embodies the way a family of related programs or pieces of software work. It represents a generic design solution that can be adapted to a variety of specific

problems in a given domain. For example, a single framework can embody the way a user interface works, even though two different user interfaces created with the same framework might solve quite different interface problems.

5 Thus, through the development of frameworks for solutions to various problems and programming tasks, significant reductions in the design and development effort for software can be achieved. A preferred embodiment of the invention utilizes HyperText Markup Language (HTML) to implement documents on the Internet together with a general-purpose secure communication protocol for a transport medium between the client and the Newco. HTTP or other protocols could be readily substituted for HTML without undue experimentation. Information on these products is available in T. Berners-Lee, D. Connolly, "RFC 1866: Hypertext Markup Language - 2.0" (Nov. 1995); and R. Fielding, H. Frystyk, T. Berners-Lee, J. Gettys and J.C. Mogul, "Hypertext Transfer Protocol -- HTTP/1.1: HTTP Working Group Internet Draft" (May 2, 1996). HTML is a simple data format used to create hypertext documents that are portable from one platform to another. HTML documents are SGML documents with generic semantics that are appropriate for representing information from a wide range of domains. HTML has been in use by the World-Wide Web global information initiative since 1990. HTML is an application of ISO Standard 8879:1986 Information Processing Text and Office Systems; Standard Generalized Markup Language (SGML).

To date, Web development tools have been limited in their ability to create dynamic Web applications which span from client to server and interoperate with existing computing resources. Until recently, HTML has been the dominant technology used in development of Web-based solutions. However, HTML has proven to be inadequate in the following areas:

- Poor performance;
 - Restricted user interface capabilities;
 - Can only produce static Web pages;
 - Lack of interoperability with existing applications and data; and
- 5 • Inability to scale.

Sun Microsystem's Java language solves many of the client-side problems by:

- Improving performance on the client side;
 - Enabling the creation of dynamic, real-time Web applications; and
- 10 • Providing the ability to create a wide variety of user interface components.

With Java, developers can create robust User Interface (UI) components. Custom "widgets" (e.g. real-time stock tickers, animated icons, etc.) can be created, and client-side performance is improved. Unlike HTML, Java supports the notion of client-side validation, offloading appropriate processing onto the client for improved performance. Dynamic, real-time Web pages can be created. Using the above-mentioned custom UI components, dynamic Web pages can also be created.

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Sun's Java language has emerged as an industry-recognized language for "programming the Internet." Sun defines Java as: "a simple, object-oriented, distributed, interpreted, robust, secure, architecture-neutral, portable, high-performance, multithreaded, dynamic, buzzword-compliant, general-purpose programming language. Java supports programming for the Internet in the form of platform-independent Java applets." Java applets are small, specialized applications that comply with Sun's Java Application Programming Interface (API) allowing developers to add "interactive content" to Web documents (e.g. simple animations, page adornments, basic games, etc.). Applets execute

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within a Java-compatible browser (e.g. Netscape Navigator) by copying code from the server to client. From a language standpoint, Java's core feature set is based on C++. Sun's Java literature states that Java is basically "C++, with extensions from Objective C for more dynamic method resolution".

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Another technology that provides similar function to JAVA is provided by Microsoft and ActiveX Technologies, to give developers and Web designers wherewithal to build dynamic content for the Internet and personal computers. ActiveX includes tools for developing animation, 3-D virtual reality, video and other multimedia content. The tools
10 use Internet standards, work on multiple platforms, and are being supported by over 100 companies. The group's building blocks are called ActiveX Controls, small, fast components that enable developers to embed parts of software in hypertext markup language (HTML) pages. ActiveX Controls work with a variety of programming languages including Microsoft Visual C++, Borland Delphi, Microsoft Visual Basic programming
15 system and, in the future, Microsoft's development tool for Java, code named "Jakarta." ActiveX Technologies also includes ActiveX Server Framework, allowing developers to create server applications. One of ordinary skill in the art readily recognizes that ActiveX could be substituted for JAVA without undue experimentation to practice the invention.

20 In accordance with a preferred embodiment, BackgroundFinder (BF) is implemented as an agent responsible for preparing an individual for an upcoming meeting by helping him/her retrieve relevant information about the meeting from various sources. BF receives input text in character form indicative of the target meeting. The input text is generated in accordance with a preferred embodiment by a calendar program that includes
25 the time of the meeting. As the time of the meeting approaches, the calendar program is queried to obtain the text of the target event and that information is utilized as input to the agent. Then, the agent parses the input meeting text to extract its various components

such as title, body, participants, location, time etc. The system also performs pattern matching to identify particular meeting fields in a meeting text. This information is utilized to query various sources of information on the web and obtain relevant stories about the current meeting to send back to the calendaring system. For example, if an individual has a meeting with Netscape and Microsoft to talk about their disputes, and would obtain this initial information from the calendaring system. It will then parse out the text to realize that the companies in the meeting are "Netscape" and "Microsoft" and the topic is "disputes." Then, the system queries the web for relevant information concerning the topic. Thus, in accordance with an objective of the invention, the system updates the calendaring system and eventually the user with the best information it can gather to prepare the user for the target meeting. In accordance with a preferred embodiment, the information is stored in a file that is obtained via selection from a link imbedded in the calendar system.

PROGRAM ORGANIZATION

A computer program in accordance with a preferred embodiment is organized in five distinct modules: BF.Main, BF.Parse, Background Finder.Error, BF.PatternMatching and BF.Search. There is also a frmMain which provides a user interface used only for debugging purposes. The executable programs in accordance with a preferred embodiment never execute with the user interface and should only return to the calendaring system through Microsoft's Winsock control. A preferred embodiment of the system executes in two different modes which can be specified under the command line sent to it by the calendaring system. When the system runs in simple mode, it executes a keyword query to submit to external search engines. When executed in complex mode, the system performs pattern matching before it forms a query to be sent to a search engine.

DATA STRUCTURES

The system in accordance with a preferred embodiment utilizes three user defined structures:

1. TMeetingRecord;
- 5 2. TPatternElement; and
3. TPatternRecord.

The user-defined structure, tMeetingRecord, is used to store all the pertinent information concerning a single meeting. This info includes userID, an original description of the meeting, the extracted list of keywords from the title and body of meeting etc. It is
10 important to note that only one meeting record is created per instance of the system in accordance with a preferred embodiment. This is because each time the system is spawned to service an upcoming meeting, it is assigned a task to retrieve information for only one meeting. Therefore, the meeting record created corresponds to the current meeting examined. ParseMeetingText populates this meeting record and it is then passed
15 around to provide information about the meeting to other functions.

If GoPatternMatch can bind any values to a particular meeting field, the corresponding entries in the meeting record is also updated. The structure of tMeetingRecord with each field described in parentheses is provided below in accordance with a preferred embodiment.

20

A.1.1.1.1.1	Public Type tMeetingRecord
sUserID As String	(user id given by Munin)
sTitleOrig As String	(original non stop listed title we need to keep around to send back to Munin)
25 sTitleKW As String	(stoplisted title with only keywords)
sBodyKW As String	(stoplisted body with only keywords)

sCompany() As String (companys identified in title or body through pattern matching)

sTopic() As String (topics identified in title or body through pattern matching)

sPeople() As String (people identified in title or body through pattern matching)

5 sWhen() As String (time identified in title or body through pattern matching)

sWhere() As String (location identified in title or body through pattern matching)

sLocation As String (location as passed in by Munin)

sTime As String (time as passed in by Munin)

sParticipants() As String (all participants engaged as passed in by Munin)

10 sMeetingText As String (the original meeting text w/o userid)

End Type

There are two other structures which are created to hold each individual pattern utilized in pattern matching. The record tAPatternRecord is an array containing all the components /
15 elements of a pattern. The type tAPatternElement is an array of strings which represent an element in a pattern. Because there may be many "substitutes" for each element, we need an array of strings to keep track of what all the substitutes are. The structures of tAPatternElement and tAPatternRecord are presented below in accordance with a preferred embodiment.

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Public Type tAPatternElement

elementArray() As String

End Type

Public Type tAPatternRecord

25 patternArray() As tAPatternElement

End Type

COMMON USER DEFINED CONSTANTS

Many constants are defined in each declaration section of the program which may need to be updated periodically as part of the process of maintaining the system in accordance with a preferred embodiment. The constants are accessible to allow dynamic

5 configuration of the system to occur as updates for maintaining the code.

Included in the following tables are lists of constants from each module which I thought are most likely to be modified from time to time. However, there are also other constants used in the code not included in the following list. It does not mean that these non-
10 included constants will never be changed. It means that they will change much less frequently.

For the Main Module (BF.Main) :

CONSTANT	PRESET VALUE	USE
MSGTOMUNIN_TYPE	6	Define the message number used to identify messages between BF and Munin
IP_ADDRESS_MUNIN	"10.2.100.48"	Define the IP address of the machine in which Munin and BF are running on so they can transfer data through UDP.
PORT_MUNIN	7777	Define the remote port in which we are operating on.
TIMEOUT_AV	60	Define constants for setting time out in inet controls

CONSTANT	PRESET VALUE	USE
TIMEOUT_NP	60	Define constants for setting time out in inet controls
CMD_SEPARATOR	"\"	Define delimiter to tell which part of Munin's command represents the beginning of our input meeting text
OUTPARAM_SEPARATOR OR	::"	Define delimiter for separating out different portions of the output. The separator is for delimiting the msg type, the user id, the meeting title and the beginning of the actual stories retrieved.

For the Search Module (BF.Search):

CONSTANT	CURRENT VALUE	USE
PAST_NDAYS	5	Define number of days you want to look back for AltaVista articles. Doesn't really matter now because we aren't really doing a news search in alta vista. We want all info.
CONNECTOR_AV_URL	" +AND+"	Define how to connect keywords. We want all our keywords in the

CONSTANT	CURRENT VALUE	USE
		string so for now use AND. If you want to do an OR or something, just change connector.
CONNECTOR_NP_URL	" +AND+"	Define how to connect keywords. We want all our keywords in the string so for now use AND. If you want to do an OR or something, just change connector.
NUM_NP_STORIES	3	Define the number of stories to return back to Munin from NewsPage.
NUM_AV_STORIES	3	Define the number of stories to return back to Munin from AltaVista.

5 For the Parse Module (BF.Parse):

CONSTANT	CURRENT VALUE	USE
PORTION_SEPARATOR	"::"	Define the separator between different portions of the meeting text sent in by Munin. For example

CONSTANT	CURRENT VALUE	USE
		in "09::Meet with Chad::about life::Chad Denise::::::" "::" is the separator between different parts of the meeting text.
PARTICIPANT_SEPARATOR	" "	Define the separator between each participant in the participant list portion of the original meeting text. Refer to example above.

For Pattern Matching Module (BFPatternMatch): There are no constants in this module which require frequent updates.

General Process Flow

The best way to depict the process flow and the coordination of functions between each other is with the five flowcharts illustrated in Figures 2 to 6. Figure 2 depicts the overall process flow in accordance with a preferred embodiment. Processing commences at the top of the chart at function block 200 which launches when the program starts. Once the application is started, the command line is parsed to remove the appropriate meeting text to initiate the target of the background find operation in accordance with a preferred embodiment as shown in function block 210. A global stop list is generated after the target is determined as shown in function block 220. Then, all the patterns that are utilized for matching operations are generated as illustrated in function block 230. Then, by tracing through the chart, function block 200 invokes GoBF 240 which is responsible

for logical processing associated with wrapping the correct search query information for the particular target search engine. For example, function block 240 flows to function block 250 and it then calls GoPatternMatch as shown in function block 260. To see the process flow of GoPatternMatch, we swap to the diagram titled "Process Flow for BF's Pattern Matching Unit."

One key thing to notice is that functions depicted at the same level of the chart are called by in sequential order from left to right (or top to bottom) by their common parent function. For example, Main 200 calls ProcessCommandLine 210, then CreateStopListist 220, then CreatePatterns 230, then GoBackgroundFinder 240. Figures 3 to 6 detail the logic for the entire program, the parsing unit, the pattern matching unit and the search unit respectively. Figure 6 details the logic determinative of data flow of key information through BackgroundFinder, and shows the functions that are responsible for creating or processing such information.

DETAILED SEARCH MODE

ARCHITECTURE UNDER THE SIMPLE QUERY

SEARCH ALTA VISTA

(Function block 270 of Figure 2)

The Alta Vista search engine utilizes the identifies and returns general information about topics related to the current meeting as shown in function block 270 of Figure 2. The system in accordance with a preferred embodiment takes all the keywords from the title portion of the original meeting text and constructs an advanced query to send to Alta Vista. The keywords are logically combined together in the query. The results are also

ranked based on the same set of keywords. One of ordinary skill in the art will readily comprehend that a date restriction or publisher criteria could be facilitated on the articles we want to retrieve. A set of top ranking stories are returned to the calendaring system in accordance with a preferred embodiment.

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NEWS PAGE

(Function block 275 of Figure 2)

The NewsPage search system is responsible for giving us the latest news topics related to a target meeting. The system takes all of the keywords from the title portion of the
10 original meeting text and constructs a query to send to the NewsPage search engine. The keywords are logically combined together in the query. Only articles published recently are retrieved. The Newspaper search system provides a date restriction criteria that is settable by a user according to the user's preference. The top ranking stories are returned to the calendaring system.

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Figure 3 is a user profile data model in accordance with a preferred embodiment.

Processing commences at function block 300 which is responsible for invoking the program from the main module. Then, at function block 310, a wrapper function is invoked to prepare for the keyword extraction processing in function block 320. After

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the keywords are extracted, then processing flows to function block 330 to determine if the delimiters are properly positioned. Then, at function block 340, the number of words in a particular string is calculated and the delimiters for the particular field are and a particular field from the meeting text is retrieved at function block 350. Then, at function block 380, the delimiters of the string are again checked to assure they are placed

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appropriately. Finally, at function block 360, the extraction of each word from the title and body of the message is performed a word at a time utilizing the logic in function

FIG. 3

block 362 which finds the next closest word delimiter in the input phrase, function block 364 which strips unnecessary materials from a word and function block 366 which determines if a word is on the stop list and returns an error if the word is on the stop list.

5 **PATTERN MATCHING IN ACCORDANCE WITH A PREFERRED EMBODIMENT**

The limitations associated with a simple searching method include the following:

- 10 1. Because it relies on a stoplist of unwanted words in order to extract from the meeting text a set of keywords, it is limited by how comprehensive the stoplist is. Instead of trying to figure out what parts of the meeting text we should throw away, we should focus on what parts of the meeting text we want.
- 15 2. A simple search method in accordance with a preferred embodiment only uses the keywords from a meeting title to form queries to send to Alta Vista and NewsPage. This ignores an alternative source of information for the query, the body of the meeting notice. We cannot include the keywords from the meeting body to form our queries because this often results in queries which are too long and so complex that we often obtain no meaningful results.
- 20 3. There is no way for us to tell what each keyword represents. For example, we may extract "Andy" and "Grove" as two keywords. However, a simplistic search has no way knowing that "Andy Grove" is in fact a person's name. Imagine the possibilities if we could somehow intelligently guess that "Andy Grove" is a person's name. We can find out if he is an Andersen person and if so what kind of projects he's been on before etc. etc.
- 25 4. In summary, by relying solely on a stoplist to parse out unnecessary words, we suffer from "information overload".

PATTERN MATCHING OVERCOMES THESE LIMITATIONS IN ACCORDANCE WITH A PREFERRED EMBODIMENT

5 Here's how the pattern matching system can address each of the corresponding issues
above in accordance with a preferred embodiment.

1. By doing pattern matching, we match up only parts of the meeting text that we want
and extract those parts.

2. By performing pattern matching on the meeting body and extracting only the parts
10 from the meeting body that we want. Our meeting body will not go to complete
waste then.

3. Pattern matching is based on a set of templates that we specify, allowing us to
identify people names, company names etc from a meeting text.

4. In summary, with pattern matching, we no longer suffer from information overload.
15 Of course, the big problem is how well our pattern matching works. If we rely
exclusively on artificial intelligence processing, we do not have a 100% hit rate. We
are able to identify about 20% of all company names presented to us.

PATTERNS

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A pattern in the context of a preferred embodiment is a template specifying the structure
of a phrase we are looking for in a meeting text. The patterns supported by a preferred
embodiment are selected because they are templates of phrases which have a high
probability of appearing in someone's meeting text. For example, when entering a
25 meeting in a calendar, many would write something such as "Meet with Bob Dutton from
Stanford University next Tuesday." A common pattern would then be something like the

word “with” followed by a person’s name (in this example it is Bob Dutton) followed by the word “from” and ending with an organization’s name (in this case, it is Stanford University).

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PATTERN MATCHING TERMINOLOGY

The common terminology associated with pattern matching is provided below.

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- ◆ Pattern: a pattern is a template specifying the structure of a phrase we want to bind the meeting text to. It contains sub units.
- ◆ Element: a pattern can contain many sub-units. These subunits are called elements. For example, in the pattern “with \$PEOPLE\$ from \$COMPANY\$”, “with” “\$PEOPLE\$” “from” “\$COMPANY\$” are all elements.
- ◆ Placeholder: a placeholder is a special kind of element in which we want to bind a value to. Using the above example, “\$PEOPLE\$” is a placeholder.
- ◆ Indicator: an indicator is another kind of element which we want to find in a meeting text but no value needs to bind to it. There may be often more than one indicator we are looking for in a certain pattern. That is why an indicator is not an “atomic” type.
- ◆ Substitute: substitutes are a set of indicators which are all synonyms of each other. Finding any one of them in the input is good.

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There are five fields which are identified for each meeting:

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- ◆ Company (\$COMPANY\$)
- ◆ People (\$PEOPLE\$)
- ◆ Location (\$LOCATION\$)
- ◆ Time (\$TIME\$)

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- In parentheses are the placeholders I used in my code as representation of the corresponding meeting fields.

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PAT GRP	PAT #	PATTERN	EXAMPLE
1	a	\$PEOPLE\$ of \$COMPANY\$	Paul Maritz of Microsoft
	b	\$PEOPLE\$ from \$COMPANY\$	Bill Gates, Paul Allen and Paul Maritz from Microsoft
2	a	\$TOPIC_UPPER\$ meeting	Push Technology Meeting
	b	\$TOPIC_UPPER\$ mtg	Push Technology Mtg
	c	\$TOPIC_UPPER\$ demo	Push Technology demo
	d	\$TOPIC_UPPER\$ interview	Push Technology interview
	e	\$TOPIC_UPPER\$ presentation	Push Technology presentation
	f	\$TOPIC_UPPER\$ visit	Push Technology visit
	g	\$TOPIC_UPPER\$ briefing	Push Technology briefing
	h	\$TOPIC_UPPER\$ discussion	Push Technology discussion
	i	\$TOPIC_UPPER\$ workshop	Push Technology workshop
	j	\$TOPIC_UPPER\$ prep	Push Technology prep
	k	\$TOPIC_UPPER\$ review	Push Technology review
	l	\$TOPIC_UPPER\$ lunch	Push Technology lunch
	m	\$TOPIC_UPPER\$ project	Push Technology project
	n	\$TOPIC_UPPER\$ projects	Push Technology projects
3	a	\$COMPANY\$ corporation	Intel Corporation

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	b	\$COMPANY\$ corp.	IBM Corp.
	c	\$COMPANY\$ systems	Cisco Systems
	d	\$COMPANY\$ limited	IBM limited
	e	\$COMPANY\$ ltd	IBM ltd
4	a	about \$TOPIC_ALL\$	About intelligent agents technology
	b	discuss \$TOPIC_ALL\$	Discuss intelligent agents technology
	c	show \$TOPIC_ALL\$	Show the client our intelligent agents technology
	d	re: \$TOPIC_ALL\$	re: intelligent agents technology
	e	review \$TOPIC_ALL\$	Review intelligent agents technology
	f	agenda	The agenda is as follows: --clean up --clean up --clean up
	g	agenda: \$TOPIC_ALL\$	Agenda: --demo client intelligent agents technology. --demo ecommerce.
5	a	w/\$PEOPLE\$ of \$COMPANY\$	Meet w/Joe Carter of Andersen Consulting
	b	w/\$PEOPLE\$ from	Meet w/Joe Carter from

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		\$COMPANY\$	Andersen Consulting
6	a	w/\$COMPANY\$ per \$PEOPLE\$	Talk w/Intel per Jason Foster
7	a	At \$TIME\$	at 3:00pm
	b	Around \$TIME\$	Around 3:00 pm
8	a	At \$LOCATION\$	At LuLu's resturant
	b	In \$LOCATION\$	in Santa Clara
9	a	Per \$PEOPLE\$	per Susan Butler
10	a	call w/\$PEOPLE\$	Conf call w/John Smith
	B	call with \$PEOPLE\$	Conf call with John Smith
11	A	prep for \$TOPIC_ALL\$	Prep for London meeting
	B	preparation for \$TOPIC_ALL\$	Preparation for London meeting

Figure 4 is a detailed flowchart of pattern matching in accordance with a preferred embodiment. Processing commences at function block 400 where the main program invokes the pattern matching application and passes control to function block 410 to commence the pattern match processing. Then, at function block 420, the wrapper function loops through to process each pattern which includes determining if a part of the text string can be bound to a pattern as shown in function block 430. Then, at function block 440, various placeholders are bound to values if they exist, and in function block 441, a list of names separated by punctuation are bound, and at function block 442 a full name is processed by finding two capitalized words as a full name and grabbing the next letter after a space after a word to determine if it is capitalized. Then, at function block 443, time is parsed out of the string in an appropriate manner and the next word after a

blank space in function block 444. Then, at function block 445, the continuous phrases of capitalized words such as company, topic or location are bound and in function block 446, the next word after the blank is obtained for further processing in accordance with a preferred embodiment. Following the match meeting field processing, function block

5 450 is utilized to locate an indicator which is the head of a pattern, the next word after the blank is obtained as shown in function block 452 and the word is checked to determine if the word is an indicator as shown in function block 454. Then, at function block 460, the string is parsed to locate an indicator which is not at the end of the pattern and the next word after unnecessary white space such as that following a line feed or a carriage return
10 is processed as shown in function block 462 and the word is analyzed to determine if it is an indicator as shown in function block 464. Then, in function block 470, the temporary record is reset to the null set to prepare it for processing the next string and at function block 480, the meeting record is updated and at function block 482 a check is performed to determine if an entry is already made to the meeting record before parsing the meeting
15 record again.

USING THE IDENTIFIED MEETING FIELDS

Now that we have identified fields within the meeting text which we consider important, there are quite a few things we can do with it. One of the most important applications of
20 pattern matching is of course to improve the query we construct which eventually gets submitted to Alta Vista and News Page. There are also a lot of other options and enhancements which exploit the results of pattern matching that we can add to BF. These other options will be described in the next section. The goal of this section is to give the reader a good sense of how the results obtained from pattern matching can be used to help
25 us obtain better search results.

Figure 5 is a flowchart of the detailed processing for preparing a query and obtaining information from the Internet in accordance with a preferred embodiment. Processing commences at function block 500 and immediately flows to function block 510 to process the wrapper functionality to prepare for an Internet search utilizing a web search engine.

- 5 If the search is to utilize the Alta Vista search engine, then at function block 530, the system takes information from the meeting record and forms a query in function blocks 540 to 560 for submittal to the search engine. If the search is to utilize the NewsPage search engine, then at function block 520, the system takes information from the meeting record and forms a query in function blocks 521 to 528.

10

Alta Vista Search Engine

The strength of the Alta Vista search engine is that it provides enhanced flexibility.

Using its advance query method, one can construct all sorts of Boolean queries and rank the search however you want. However, one of the biggest drawbacks with Alta Vista is

- 15 that it is not very good at handling a large query and is likely to give back irrelevant results. If we can identify the topic and the company within a meeting text, we can form a pretty short but comprehensive query which will hopefully yield better results. We also want to focus on the topics found. It may not be of much merit to the user to find out info about a company especially if the user already knows the company well and has had
- 20 numerous meetings with them. It's the topics they want to research on.

News Page Search Engine

The strength of the News Page search engine is that it does a great job searching for the most recent news if you are able to give it a valid company name. Therefore when we submit a query to the news page web site, we send whatever company name we can

- 25 identify and only if we cannot find one do we use the topics found to form a query. If neither one is found, then no search is performed. The algorithmn utilized to form the

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query to submit to Alta Vista is illustrated in Figure 7. The algorithm that we will use to form the query to submit to News Page is illustrated in Figure 8.

The following table describes in detail each function in accordance with a preferred embodiment. The order in which functions appear mimics the process flow as closely as possible. When there are situations in which a function is called several times, this function will be listed after the first function which calls it and its description is not duplicated after every subsequent function which calls it.

Procedure Name	Type	Called By	Description
Main (BF.Main)	Public Sub	None	This is the main function where the program first launches. It initializes BF with the appropriate parameters(e.g. Internet time-out, stoplist...) and calls GoBF to launch the main part of the program.
ProcessCommandLine (BF.Main)	Private Sub	Main	This function parses the command line. It assumes that the delimiter indicating the beginning of input from Munin is stored in the constant CMD_SEPARATOR.
CreateStopList	Private	Main	This function sets up a stop

Procedure Name	Type	Called By	Description
st (BF.Main)	Function		list for future use to parse out unwanted words from the meeting text. There are commas on each side of each word to enable straight checking.
CreatePatterns (BF.Pattern Match)	Public Sub	Main	This procedure is called once when BF is first initialized to create all the potential patterns that portions of the meeting text can bind to. A pattern can contain however many elements as needed. There are two types of elements. The first type of elements are indicators. These are real words which delimit the potential of a meeting field (eg company) to follow. Most of these indicators are stop words as expected because stop words are words

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Procedure Name	Type	Called By	Description
			<p>usually common to all meeting text so it makes sense they form patterns. The second type of elements are special strings which represent placeholders.</p> <p>A placeholder is always in the form of \$*\$ where * can be either PEOPLE, COMPANY, TOPIC_UPPER, TIME, LOCATION or TOPIC_ALL. A pattern can begin with either one of the two types of elements and can be however long, involving however any number/type of elements.</p> <p>This procedure dynamically creates a new pattern record for</p> <p>each pattern in the table and it also dynamically creates new tAPatternElements for</p>

Procedure Name	Type	Called By	Description
			each element within a pattern. In addition, there is the concept of being able to substitute indicators within a pattern. For example, the pattern \$PEOPLE\$ of \$COMPANY\$ is similar to the pattern \$PEOPLE\$ from \$COMPANY\$. "from" is a substitute for "of" . Our structure should be able to express such a need for substitution.
GoBF (BF.Main)	Public Sub	Main	This is a wrapper procedurer that calls both the parsing and the searching subroutines of the BF. It is also responsible for sending data back to Munin.
ParseMeetingText (BF.Parse)	Public Function	GoBackgroundFinder	This function takes the initial meeting text and identifies the userID of the record as well as other parts of the meeting text including the

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Procedure Name	Type	Called By	Description
			<p>title, body, participant list, location and time. In addition, we call a helper function ProcessStopList to eliminate all the unwanted words from the original meeting title and meeting body so that only keywords are left. The information parsed out is stored in the MeetingRecord structure. Note that this function does no error checking and for the most time assumes that the meeting text string is correctly formatted by Munin.</p> <p>The important variable is thisMeeting Record is the temp holder for all info regarding current meeting. It's eventually returned to caller.</p>
FormatDelim	Private	ParseMeetingTe	There are 4 ways in which

Procedure Name	Type	Called By	Description
itation (BF.Parse)		xt, DetermineNum Words, GetAWordFrom String	the delimiters can be placed. We take care of all these cases by reducing them down to Case 4 in which there are no delimiters around but only between fields in a string(e.g. A::B::C)
DetermineNumWords (BF.Parse)	Public Function	ParseMeeting Text, ProcessStop List	This functions determines how many words there are in a string (stInEvalString) The function assumes that each word is separated by a designated separator as specified in stSeparator. The return type is an integer that indicates how many words have been found assuming each word in the string is separated by stSeparator. This function is always used along with GetAWordFromString and should be called before

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Procedure Name	Type	Called By	Description
			calling GetAWordFrom String.
GetAWordFromString (BF.Parse)	Public Function	ParseMeeting Text, ProcessStop List	<p>This function extracts the ith word of the string(stInEvalString) assuming that each word in the string is separated by a designated separator contained in the variable stSeparator.</p> <p>In most cases, use this function with DetermineNumWords. The function returns the wanted word. This function checks to make sure that iInWordNum is within bounds so that i is not greater than the total number of words in string or less than/equal to zero. If it is out of bounds, we return empty string to indicate we can't get anything. We try to</p>

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Procedure Name	Type	Called By	Description
			make sure this doesn't happen by calling DetermineNumWords first.
ParseAndCleanPhrase (BF.Parse)	Private Function	ParseMeetingText	<p>This function first grabs the word and send it to CleanWord in order strip the stuff that nobody wants. There are things in parseWord that will kill the word, so we will need a method of looping through the body and rejecting words without killing the whole function</p> <p>i guess keep CleanWord and check a return value</p> <p>ok, now I have a word so I need to send it down the parse chain. This chain goes ParseCleanPhrase -> CleanWord -> EvaluateWord. If the word gets through the entire chain without being</p>

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Procedure Name	Type	Called By	Description
			<p>killed, it will be added at the end to our keyword string.</p> <p>first would be the function that checks for "/" as a delimiter and extracts the parts of that. This I will call "StitchFace" (Denise is more normal and calls it GetAWordFromString)</p> <p>if this finds words, then each of these will be sent, in turn, down the chain. If these get through the entire chain without being added or killed then they will be added rather than tossed.</p>

Procedure Name	Type	Called By	Description
FindMin (BF.Parse)	Private Function	ParseAndCleanP hrase	This function takes in 6 input values and evaluates to see what the minimum non zero value is. It first creates an array as a holder so that we can sort the five input values in ascending order. Thus the minimum value will be the first non zero value element of the array. If we go through entire array without finding a non zero value, we know that there is an error and we exit the function.
CleanWord (BF.Parse)	Private Function	ParseAndCleanP hrase	This function tries to clean up a word in a meeting text. It first of all determines if the string is of a valid length. It then passes it through a series of tests to see it is clean and when needed, it will edit the word and strip unnecessary characters off of

Procedure Name	Type	Called By	Description
			it. Such tests includes getting rid of file extensions, non chars, numbers etc.
EvaluateWord (BF.Parse)	Private Function	ParseAndCleanPhrase	This function tests to see if this word is in the stop list so it can determine whether to eliminate the word from the original meeting text. If a word is not in the stoplist, it should stay around as a keyword and this function exits beautifully with no errors. However, if the words is a stopword, an error must be returned. We must properly delimit the input test string so we don't accidentally retrieve sub strings.
GoPatternMatch (BF.Pattern Match)	Public Sub	GoBF	This procedure is called when our QueryMethod is set to complex query meaning we do want to do all the pattern matching stuff.It

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Procedure Name	Type	Called By	Description
			's a simple wrapper function which initializes some arrays and then invokes pattern matching on the title and the body.
MatchPatterns (BF.Pattern Match)	Public Sub	GoPattern Match	This procedure loops through every pattern in the pattern table and tries to identify different fields within a meeting text specified by sInEvalString. For debugging purposes it also tries to tabulate how many times a certain pattern was triggered and stores it in gTabulateMatches to see whichp pattern fired the most. gTabulateMatches is stored as a global because we want to be able to run a batch file of 40 or 50 test strings and still be able to know how often a pattern was triggered.
MatchAPatte	Private	MatchPatterns	This function goes through

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Procedure Name	Type	Called By	Description
m (BF.Pattern Match)	Function		each element in the current pattern. It first evaluates to determine whether element is a placeholder or an indicator. If it is a placeholder, then it will try to bind the placeholder with some value. If it is an indicator, then we try to locate it. There is a trick however. Depending on whether we are at current element is the head of the pattern or not we want to take different actions. If we are at the head, we want to look for the indicator or the placeholder. If we can't find it, then we know that the current pattern doesn't exist and we quit. However, if it is not the head, then we continue looking, because

Procedure Name	Type	Called By	Description
			there may still be a head somewhere. We retry in this case.
etingField (BF.Pattern Match)	Private Function	MatchAPattern	This function uses a big switch statement to first determine what kind of placeholder we are talking about and depending on what type of placeholder, we have specific requirements and different binding criteria as specified in the subsequent functions called such as BindNames, BindTime etc. If binding is successful we add it to our guessing record.
BindNames (BF.Pattern Match)	Private Function	MatchMeetingField	In this function, we try to match names to the corresponding placeholder \$PEOPLE\$. Names are defined as any consecutive two words which are capitalized. We also what to

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Procedure Name	Type	Called By	Description
			retrieve a series of names which are connected by and , or & so we look until we don't see any of these 3 separators anymore. Note that we don 't want to bind single word names because it is probably too general anyway so we don't want to produce broad but irrelevant results. This function calls BindAFullName which binds one name so in a since BindNames collects all the results from BindAFullName
BindAFullName (BF.Pattern Match)	Private Function	BindNames	This function tries to bind a full name. If the \$PEOPLES placeholder is not the head of the pattern, we know that it has to come right at the beginning of the test string because we 've been deleting stuff off the head of the

Procedure Name	Type	Called By	Description
			<p>string all along.</p> <p>If it is the head, we search until we find something that looks like a full name. If we can't find it, then there's no such pattern in the text entirely and we quit entirely from this pattern. This should eventually return us to the next pattern in MatchPatterns.</p>
GetNextWordAfterWhiteSpace (BF.Pattern Match)	Private Function	BindAFullName, BindTime, BindCompanyTo picLoc	This function grabs the next word in a test string. It looks for the next word after white spaces, @ or /. The word is defined to end when we encounter another one of these white spaces or separators.
BindTime (BF.Pattern Match)	Private Function	MatchMeetingField	Get the immediate next word and see if it looks like a time pattern. If so we've found a time and so we want to add it to the record. We probably

Procedure Name	Type	Called By	Description
			should add more time patterns. But people don't seem to like to enter the time in their titles these days especially since we now have tools like OutLook.
BindCompan yTopicLoc (BF.Pattern Match)	Private Function	MatchMeetingFi eld	This function finds a continuous capitalized string and binds it to stMatch which is passed by reference from MatchMeetingField. A continuous capitalized string is a sequence of capitalized words which are not interrupted by things like , . etc. There's probably more stuff we can add to the list of interruptions.
LocatePatter nHead (BF.Pattern Match)	Private Function	MatchAPattern	This function tries to locate an element which is an indicator. Note that this indicator SHOULD BE AT THE HEAD of the pattern

SHOULD BE AT THE HEAD

Procedure Name	Type	Called By	Description
			otherwise it would have gone to the function LocateIndicator instead. Therefore, we keep on grabbing the next word until either there's no word for us to grab (quit) or if we find one of the indicators we are looking for.
ContainInArray (BF.Pattern Match)	Private Function	LocatePattern Head, LocateIndicator	' This function is really simple. It loops through all the elements in the array ' to find a matching string.
LocateIndicator (BF.Pattern Match)	Private Function	MatchAPattern	This function tries to locate an element which is an indicator. Note that this indicator is NOT at the head of the pattern otherwise it would have gone to LocatePatternHead instead. Because of this, if our pattern is to be satisfied, the next word we grab HAS to be the indicator or else we

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Procedure Name	Type	Called By	Description
			would have failed. Thus we only grab one word, test to see if it is a valid indicator and then return result.
InitializeGuessesRecord (BF.Pattern Match)	Private Sub	MatchAPattern	This function reinitializes our temporary test structure because we have already transferred the info to the permanent structure, we can reinitialize it so they each have one element
AddToMeetingRecord (BF.Pattern Match)	Private Sub	MatchAPattern	This function is only called when we know that the information stored in tInCurrGuesses is valid meaning that it represents legitimate guesses of meeting fields ready to be stored in the permanent record, tInMeetingRecord. We check to make sure that we do not store duplicates and we also what to clean up what we want to store so that

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Procedure Name	Type	Called By	Description
			there's no cluttered crap such as punctuations, etc. The reason why we don't clean up until now is to save time. We don't waste resources calling ParseAndCleanPhrase until we know for sure that we are going to add it permanently.
NoDuplicateEntry (BF.Pattern Match)	Private Function	AddToMeetingRecord	This function loops through each element in the array to make sure that the test string aString is not the same as any of the strings already stored in the array. Slightly different from ContainInArray.
SearchAltaVista (BF.Search)	Public Function	GoBackGroundFinder	This function prepares a query to be submitted to AltaVista Search engine. It submits it and then parses the returning result in the appropriate format containing the title, URL and

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Procedure Name	Type	Called By	Description
			body/summary of each story retrieved. The number of stories retrieved is specified by the constant NUM_AV_STORIES. Important variables include stURLAltaVista used to store query to submit stResultHTML used to store html from page specified by stURLAltaVista.
ConstructAltaVistaURL (BF.Search)	Private Function	SearchAltaVista	This function constructs the URL string for the alta vista search engine using the advanced query search mode. It includes the keywords to be used, the language and how we want to rank the search. Depending on whether we want to use the results of our pattern matching unit, we construct our query differently.
ConstructSi	Private	ConstructAltaVi	This function marches down

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Procedure Name	Type	Called By	Description
SimpleKeyword (BF.Search)	Function	staURL, ConstructNewsPageURL	the list of keywords stored in the stTitleKW or stBodyKW fields of the input meeting record and links them up into one string with each keyword separated by a connector as determined by the input variable stInConnector. Returns this newly constructed string.
ConstructComplexAVKeyword (BF.Search)	Private Function	ConstructAltaVistaURL	This function constructs the keywords to be send to the AltaVista site. Unlike ConstructSimpleKeyword which simply takes all the keywords from the title to form the query, this function will look at the results of BF's pattern matching process and see if we are able to identify any specific company names or topics for constructing the queries. Query will

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Procedure Name	Type	Called By	Description
			include company and topic identified and default to simple query if we cannot identify either company or topic.
JoinWithConnectors (BF.Search)	Private Function	ConstructComplexAVKey Word, ConstructComplexNPKey Word, RefineWithRank	This function simply replaces the spaces between the words within the string with a connector which is specified by the input.
RefineWithDate (NOT CALLED AT THE MOMENT) (BF.Search)	Private Function	ConstructAltaVistaURL	This function constructs the date portion of the alta vista query and returns this portion of the URL as a string. It makes sure that alta vista searches for articles within the past PAST_NDAYS.
RefineWithRank (BF.Search)	Private Function	ConstructAltaVistaURL	This function constructs the string needed to be passed to Altavista in order to rank an advanced query search. If

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Procedure Name	Type	Called By	Description
			we are constructing the simple query we will take in all the keywords from the title. For the complex query, we will take in words from company and topic, much the same way we formed the query in ConstructComplexAVKeyWord.
IdentifyBlock (BF.Parse)	Public Function	SearchAltaVista, SearchNewsPage	This function extracts the block within a string marked by the beginning and the ending tag given as inputs starting at a certain location(iStart). The block retrieved does not include the tags themselves. If the block cannot be identified with the specified delimiters, we return unsuccessful through the parameter iReturnSuccess passed to use by reference. The return type

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Procedure Name	Type	Called By	Description
			is the block retrieved.
IsOpenURL Error (BF.Error)	Public Function	SearchAltaVista, SearchNewsPage	This function determines whether the error encountered is that of a timeout error. It restores the mouse to default arrow and then returns true if it is a time out or false otherwise.
SearchNews Page (BF.Search)	Public Function	GoBackGroundF inder	This function prepares a query to be submitted to NewsPage Search engine. It submits it and then parses the returning result in the appropriate format containing the title, URL and body/summary of each story retrieved. The number of stories retrieved is specified by the constant UM_NP_STORIES

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Procedure Name	Type	Called By	Description
ConstructNewsPageURL (BF.Search)	Private Function	SearchNewsPage	This function constructs the URL to send to the NewsPage site. It uses the information contained in the input meeting record to determine what keywords to use. Also depending whether we want simple or complex query, we call different functions to form strings.
ConstructComplexNPKeyWord (BF.Search)	Private Function	ConstructNewsPageURL	This function constructs the keywords to be send to the NewsPage site. UnlikeConstructKeyWordString which simply takes all the keywords from the title to form the query, this function will look at the results of BF's pattern matching process and see if we are able to identify any specific company names or topics for constructing the queries. Since newspage

Procedure Name	Type	Called By	Description
			works best when we have a company name, we 'll use only the company name and only if there is no company will we use topic.
ConstructOverallResult (BF.Main)	Private Function	GoBackGroundFinder	This function takes in as input an array of strings (stInStories) and a MeetingRecord which stores the information for the current meeting. Each element in the array stores the stories retrieved from each information source. The function simply constructs the appropriate output to send to Munin including a return message type to let Munin know that it is the BF responding and also the original user_id and meeting title so Munin knows which meeting BF is talking about.

966T" BEE96T60

Procedure Name	Type	Called By	Description
ConnectAnd TransferTo Munin (BF.Main)	Public Sub	GoBackGroundF inder	This function allows Background Finder to connect to Munin and eventually transport information to Munin. We will be using the UDP protocol instead of the TCP protocol so we have to set up the remote host and port correctly. We use a global string to store gResult Overall because although it is unnecessary with UDP, it is needed with TCP and if we ever switch back don't want to change code.
DisconnectFr omMuninAn d Quit (BF.Main)	Public Sub		

Figure 6 is a flowchart of the actual code utilized to prepare and submit searches to the Alta Vista and Newspaper search engines in accordance with a preferred embodiment.

Processing commences at function block **610** where a command line is utilized to update a calendar entry with specific calendar information. The message is next posted in accordance with function block **620** and a meeting record is created to store the current meeting information in accordance with function block **630**. Then, in function block **640** the query is submitted to the Alta Vista search engine and in function block **650**, the query is submitted to the Newpage search engine. When a message is returned from the search engine, it is stored in a results data structure as shown in function block **660** and the information is processed and stored in summary form in a file for use in preparation for the meeting as detailed in function block **670**.

Figure 7 provides more detail on creating the query in accordance with a preferred embodiment. Processing commences at function block **710** where the meeting record is parsed to obtain potential companies, people, topics, location and a time. Then, in function block **720**, at least one topic is identified and in function block **720**, at least one company name is identified and finally in function block **740**, a decision is made on what material to transmit to the file for ultimate consumption by the user.

Figure 8 is a variation on the query theme presented in Figure 7. A meeting record is parsed in function block **800**, a company is identified in function block **820**, a topic is identified in function block **830** and finally in function block **840** the topic and or the company is utilized in formulating the query.

Alternative embodiments for adding various specific features for specific user requirements are discussed below.

Enhance Target Rate for Pattern Matching

To increase BF's performance, more patterns/pattern groups are added to the procedure "CreatePatterns." The existing code for declaring patterns can be used as a template for
5 future patterns. Because everything is stored as dynamic arrays, it is convenient to reuse code by cutting and pasting. The functions BindName, BindTime, BindCompanyLocTopic which are responsible for associating a value with a placeholder can be enhanced. The enhancement is realized by increasing the set of criteria for binding a certain meeting field in order to increase the number of binding values. For
10 example, BindTime currently accepts and binds all values in the form of ##:## or #:##. To increase the times we can bind, we may want BindTime to also accept the numbers 1 to 12 followed by the more aesthetic time terminology "o'clock." Vocabulary based recognition algorithms and assigning an accuracy rate to each guess BF makes allowing only guesses which meet a certain threshold to be valid.
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Depending on what location the system identifies through pattern matching or alternatively depending on what location the user indicates as the meeting place, a system in accordance with a preferred embodiment suggests a plurality of fine restaurants whenever it detects the words lunch/dinner/breakfast. We can also use a site like
20 company finder to confirm what we got is indeed a company name or if there is no company name that pattern matching can identify, we can use a company finder web site as a "dictionary" for us to determine whether certain capitalized words represent a company name. We can even display stock prices and breaking news for a company that we have identified.

Wireless Bargain Identification in Accordance With A Preferred Embodiment

Figure 9 is a flow diagram that depicts the hardware and logical flow of control for a device and a software system designed to allow Web-based comparison shopping in conventional, physical, non-Web retail environments. A wireless phone or similar hand-held wireless device 920 with Internet Protocol capability is combined with a miniature barcode reader 910 (installed either inside the phone or on a short cable) and used to scan the Universal Product Code (UPC) bar code on a book or other product 900. The wireless device 920 transmits the bar code via an antennae 930 to the Pocket BargainFinder Service Module (running on a Web server) 940, which converts it to (in the case of books) its International Standard Book Number or (in the case of other products) whatever identifier is appropriate. The Service Module then contacts the appropriate third-party Web site(s) to find price, shipping and availability information on the product from various Web suppliers 950. This information is formatted and displayed on the hand-held device's screen. The IP wireless phone or other hand held device 920 utilizes a wireless modem such as a Ricochet SE Wireless Modem from Metricom. Utilizing this device, a user can hang out in a coffee shop with a portable computer perched on a rickety little table, with a latte sloshing dangerously close to the keyboard, and access the Internet at speeds rivaling direct connect via a telephone line.

The 8-ounce Ricochet SE Wireless Modem is about as large as a pack of cigarettes and setup is extremely simple, simply attach the modem to the back of your portable's screen with the included piece of Velcro, plug the cable into the serial port, flip up the stubby antenna, and transmit. Software setup is equally easy: a straightforward installer adds the Ricochet modem drivers and places the connection icon on your desktop. The functional aspects of the modem are identical to that of a traditional telephone modem.

Of course, wireless performance isn't nearly as reliable as a traditional dial-up phone connection. We were able to get strong connections in several San Francisco locations as long as we stayed near the windows. But inside CNET's all-brick headquarters, the

5 Ricochet couldn't connect at all. When you do get online, performance of up to 28.8 kbps is available with graceful degradation to slower speeds. But even the slower speeds didn't disappoint. Compared to the alternative--connecting via a cellular modem--the Ricochet is much faster, more reliable, and less expensive to use. Naturally, the SE Wireless is battery powered. The modem has continuous battery life of up to 12 hours. And in

10 accordance with a preferred embodiment, we ran down our portable computer's dual cells before the Ricochet started to fade.

Thus, utilizing the wireless modem, a user may utilize the web server software 940 to identify the right product 950 and then use an appropriate device's key(s) to select a

15 supplier and place an order in accordance with a preferred embodiment. The BargainFinder Service Module then consummates the order with the appropriate third-party Web supplier 960.

mySite! Personal Web Site & Intentions Value Network Prototype

20 mySite! is a high-impact, Internet-based application in accordance with a preferred embodiment that is focused on the theme of delivering services and providing a personalized experience for each customer via a personal web site in a buyer-centric world. The services are intuitively organized around satisfying customer intentions -

25 fundamental life needs or objectives that require extensive planning decisions, and coordination across several dimensions, such as financial planning, healthcare, personal and professional development, family life, and other concerns. Each member owns and

maintains his own profile, enabling him to create and browse content in the system targeted specifically at him. From the time a demand for products or services is entered, to the completion of payment, intelligent agents are utilized to conduct research, execute transactions and provide advice. By using advanced profiling and filtering, the intelligent agents learn about the user, improving the services they deliver. Customer intentions include Managing Daily Logistics (e.g., email, calendar, contacts, to-do list, bill payment, shopping, and travel planning); and Moving to a New Community (e.g., finding a place to live, moving household possessions, getting travel and shipping insurance coverage, notifying business and personal contacts, learning about the new community). From a consumer standpoint, mySite! provides a central location where a user can access relevant products and services and accomplish daily tasks with ultimate ease and convenience.

From a business standpoint, mySite! represents a value-added and innovative way to effectively attract, service, and retain customers. Intention value networks allow a user to enter through a personalized site and, and with the assistance of a learning, intelligent agent, seamlessly interact with network participants. An intention value network in accordance with a preferred embodiment provides superior value. It provides twenty four hour a day, seven days a week access to customized information, advice and products. The information is personalized so that each member views content that is highly customized to assure relevance to the required target user.

Egocentric Interface

An Egocentric Interface is a user interface crafted to satisfy a particular user's needs, preferences and current context. It utilizes the user's personal information that is stored in a central profile database to customize the interface. The user can set security permissions on and preferences for interface elements and content. The content integrated into the Egocentric Interface is customized with related information about the

user. When displaying content, the Egocentric Interface will include the relationship between that content and the user in a way that demonstrates how the content relates to the user. For instance, when displaying information about an upcoming ski trip the user has signed up for, the interface will include information about events from the user's
5 personal calendar and contact list, such as other people who will be in the area during the ski trip. This serves to put the new piece of information into a context familiar to the individual user.

Figure 10A describes the **Intention Value Network Architecture** implementation for the
10 World Wide Web. For simplification purposes, this diagram ignores the complexity pertaining to security, scalability and privacy. The customer can access the Intention Value Network with any Internet web browser 1010, such as Netscape Navigator or Microsoft Internet Explorer, running on a personal computer connected to the Internet or a Personal Digital Assistant with wireless capability. See Figure 17 for a more detailed
15 description of the multiple methods for accessing an Intention Value Network. The customer accesses the Intention Value Network through the unique name or IP address associated with the Integrator's Web Server 1020. The Integrator creates the Intention Value Network using a combination of resources, such as the Intention Database 1030, the Content Database 1040, the Supplier Profile Database 1050, and the Customer Profile
20 Database 1060.

The Intention Database 1030 stores all of the information about the structure of the intention and the types of products and services needed to fulfill the intention. Information in this database includes intention steps, areas of interest, layout templates
25 and personalization templates. The Content Database 1040 stores all of the information related to the intention, such as advice, referral information, personalized content, satisfaction ratings, product ratings and progress reports.

The Supplier Profile Database **1050** contains information about the product and service providers integrated into the intention. The information contained in this database provides a link between the intention framework and the suppliers. It includes product lists, features and descriptions, and addresses of the suppliers' product web sites. The Customer Profile Database **1060** contains personal information about the customers, such as name, address, social security number and credit card information, personal preferences, behavioral information, history, and web site layout preferences. The Supplier's Web Server **1070** provides access to all of the supplier's databases necessary to provide information and transactional support to the customer.

The Product Information Database **1080** stores all product-related information, such as features, availability and pricing. The Product Order Database **1090** stores all customer orders. The interface to this database may be through an Enterprise Resource Planning application offered by SAP, Baan, Oracle or others, or it may be accessible directly through the Supplier's Web Server or application server. The Customer Information Database **1091** stores all of the customer information that the supplier needs to complete a transaction or maintain customer records.

Figure **10B** is a flowchart providing the logic utilized to create a web page within the Egocentric Interface. The environment assumes a web server and a web browser connected through a TCP/IP network, such as over the public Internet or a private Intranet. Possible web servers could include Microsoft Internet Information Server, Netscape Enterprise Server or Apache. Possible web browsers include Microsoft Internet Explorer or Netscape Navigator. The client (i.e. web browser) makes a request **1001** to the server (i.e. web server) for a particular web page. This is usually accomplished by a user clicking on a button or a link within a web page. The web server gets the layout and

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User Persona

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when making purchases for his home. This persona may contain his home address and may indicate that this user is looking to find a good bargain when shopping. The same user may create a second persona that can be used when he is in a work context. This persona may store the user's work address and may indicate that the user prefers certain vendors or works for a certain company that has a discount program in place. When shopping for work-related items, the user may use this persona. A persona may also contain rules and restrictions. For instance, the work persona may restrict the user to making airline reservations with only one travel agent and utilizing booking rules set up by his employer.

Figure 12 describes the relationship between a user, his multiple personas and his multiple profiles. At the User Level is the User Profile **1200**. This profile describes the user and his account information. There is one unique record in the database for each user who has an account. Attached to each user are multiple Personas **1220, 1230 & 1240**. These Personas are used to group multiple Profiles into useful contexts. For instance, consider a user who lives in San Francisco and works in Palo Alto, but has a mountain cabin in Lake Tahoe. He has three different contexts in which he might be accessing his site. One context is work-related. The other two are home-life related, but in different locations. The user can create a Persona for Work **1220**, a Persona for Home **1230**, and a Persona for his cabin home **1240**. Each Persona references a different General Profile **1250, 1260 and 1270** which contains the address for that location. Hence, there are three General Profiles. Each Persona also references one of two Travel Profiles. The user maintains a Work Travel Profile **1280** that contains all of the business rules related to booking tickets and making reservations. This Profile may specify, for instance, that this person only travels in Business or First Class and his preferred airline is United Airlines. The Work Persona references this Work Travel Profile. The user may also maintain a Home Travel Profile **1290** that specifies that he prefers to travel in coach

and wants to find non-refundable fairs, since they are generally cheaper. Both the Persona for Home and the Persona for the cabin home point to the Home Travel Profile.

Figure 13 describes the data model that supports the Persona concept. The user table

- 5 **1310** contains a record for each user who has an account in the system. This table contains a username and a password **1320** as well as a unique identifier. Each user can have multiple Personas **1330**, which act as containers for more specialized structures called Profiles **1340**. Profiles contain the detailed personal information in Profile Field **1350** records. Attached to each Profile are sets of Profile Restriction **1360** records.
- 10 These each contain a Name **1370** and a Rule **1380**, which define the restriction. The Rule is in the form of a pattern like (if x then y), which allows the Rule to be restricted to certain uses. An example Profile Restriction would be the rule that dictates that the user cannot book a flight on a certain airline contained in the list. This Profile Restriction could be contained in the "Travel" Profile of the "Work" Persona set up by the user's
- 15 employer, for instance. Each Profile Field also contains a set of Permissions **1390** that are contained in that record. These permissions dictate who has what access rights to that particular Profile Field's information.

Intention-Centric Interface

- 20 Satisfying Customer Intentions, such as Planning for Retirement or Relocating requires a specialized interface. Customer Intentions require extensive planning and coordination across many areas, ranging from financial security, housing and transportation to healthcare, personal and professional development, and entertainment, among others. Satisfying Intentions requires a network of complementary businesses, working across
- 25 industries, to help meet consumers' needs.

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Personalized Product Report Service

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Figure 16 describes the algorithm for determining the personalized product ratings for a user. When the user requests a product report 1610 for product X, the algorithm retrieves the profiles 1620 from the profile database 1630 (which includes product ratings) of those users who have previously rated that product. Then the system retrieves the default thresholds 1640 for the profile matching algorithm from the content database 1650. It then maps all of the short list of users along several dimensions specified in the profile matching algorithm 1660. The top n (specified previously as a threshold variable) nearest neighbors are then determined and a test is performed to decide if they are within distance y (also specified previously as a threshold variable) of the user's profile in the set 1670 using the results from the profile matching algorithm. If they are not within the threshold, then the threshold variables are relaxed 1680, and the test is run again. This processing is repeated until the test returns true. The product ratings from the smaller set of n nearest neighbors are then used to determine a number of product statistics 1690 along several dimensions. Those statistics are inserted into a product report template 1695 and returned to the user 1697 as a product report.

Personal Profile and Services Ubiquity

This system provides one central storage place for a person's profile. This storage place is a server available through the public Internet, accessible by any device that is connected to the Internet and has appropriate access. Because of the ubiquitous accessibility of the profile, numerous access devices can be used to customize services for the user based on his profile. For example, a merchant's web site can use this profile to provide personalized content to the user. A Personal Digital Assistant (PDA) with Internet access can synchronize the person's calendar, email, contact list, task list and notes on the PDA with the version stored in the Internet site. This enables the person to

only have to maintain one version of this data in order to have it available whenever it is needed and in whatever formats it is needed.

Figure 17 presents the detailed logic associated with the many different methods for
5 accessing this centrally stored profile. The profile database **1710** is the central storage
place for the users' profile information. The profile gateway server **1720** receives all
requests for profile information, whether from the user himself or merchants trying to
provide a service to the user. The profile gateway server is responsible for ensuring that
information is only given out when the profile owner specifically grants permission. Any
10 device that can access the public Internet **1730** over TCP/IP (a standard network
communications protocol) is able to request information from the profile database via
intelligent HTTP requests. Consumers will be able to gain access to services from
devices such as their televisions **1740**, mobile phones, Smart Cards, gas meters, water
meters, kitchen appliances, security systems, desktop computers, laptops, pocket
15 organizers, PDAs, and their vehicles, among others. Likewise, merchants **1750** will be
able to access those profiles (given permission from the consumer who owns each
profile), and will be able to offer customized, personalized services to consumers because
of this.

20 One possible use of the ubiquitous profile is for a hotel chain. A consumer can carry a
Smart Card that holds a digital certificate uniquely identifying him. This Smart Card's
digital certificate has been issued by the system and it recorded his profile information
into the profile database. The consumer brings this card into a hotel chain and checks in.
The hotel employee swipes the Smart Card and the consumer enters his Pin number,
25 unlocking the digital certificate. The certificate is sent to the profile gateway server
(using a secure transmission protocol) and is authenticated. The hotel is then given
access to a certain part of the consumer's profile that he has previously specified. The

hotel can then retrieve all of the consumer's billing information as well as preferences for hotel room, etc. The hotel can also access the consumer's movie and dining preferences and offer customized menus for both of them. The hotel can offer to send an email to the consumer's spouse letting him/her know the person checked into the hotel and is safe.

- 5 All transaction information can be uploaded to the consumer's profile after the hotel checks him in. This will allow partners of the hotel to utilize the information about the consumer that the hotel has gathered (again, given the consumer's permission).

Intention Value Network

- 10 In an Intention Value Network, the overall integrator system coordinates the delivery of products and services for a user. The integrator manages a network of approved suppliers providing products and services, both physical and virtual, to a user based on the user's preferences as reflected in the user's profile. The integrator manages the relationship between suppliers and consumers and coordinates the suppliers' fulfillment of consumers' intentions. It does this by providing the consumer with information about
15 products and suppliers and offering objective advice, among other things.

- Figure 18 discloses the detailed interaction between a consumer and the integrator involving one supplier. The user accesses a Web Browser **1810** and requests product and pricing information from the integrator. The request is sent from the user's browser to
20 the integrator's Web/Application Server **1820**. The user's preferences and personal information is obtained from an integrator's customer profile database **1830** and returned to the Web/Application server. The requested product information is extracted from the supplier's product database **1840** and customized for the particular customer. The Web/Application server updates the supplier's customer information database **1850** with
25 the inquiry information about the customer. The product and pricing information is then formatted into a Web Page **1860** and returned to the customer's Web Browser.

Summary Agent

A suite of software agents running on the application and web servers are programmed to take care of repetitive or mundane tasks for the user. The agents work according to rules set up by the user and are only allowed to perform tasks explicitly defined by the user. The agents can take care of paying bills for the user, filtering content and emails, and providing a summary view of tasks and agent activity. The user interface for the agent can be modified to suit the particular user.

- 10 Figure 19 discloses the logic in accordance with a preferred embodiment processing by an agent to generate a verbal summary for the user. When the user requests the summary page 1900, the server gets the user's agent preferences 1920, such as agent type, rules and summary level from the user profile database 1930. The server gets the content 1940, such as emails, to do list items, news, and bills, from the content database 1950. The agent parses all of this content, using the rules stored in the profile database, and summarizes the content 1960. The content is formatted into a web page 1970 according to a template. The text for the agent's speech is generated 1980, using the content from the content database 1990 and speech templates stored in the database. This speech text is inserted into the web page 1995 and the page is returned to the user 1997.

Trusted Third Party

The above scenario requires the web site to maintain a guarantee of privacy of information according to a published policy. This system is the consumer's Trusted Third Party, acting on his behalf in every case, erring on the side of privacy of information, rather than on the side of stimulation of commerce opportunities. The Trusted Third Party has a set of processes in place that guarantee certain complicity with the stated policy.

“meCommerce”

This word extends the word “eCommerce” to mean “personalized electronic commerce.”

Figure 20 illustrates a display login in accordance with a preferred embodiment. The display is implemented as a Microsoft Internet Explorer application with an agent 2000 that guides a user through the process of interacting with the system to customize and personalize various system components to gather information and interact with the user’s personal requirements. A user enters a username at 2010 and a password at 2020 and selects a button 2040 to initiate the login procedure. As the logo 2030 suggests, the system transforms electronic commerce into a personalized, so called “me” commerce.

Figure 21 illustrates a managing daily logistics display in accordance with a preferred embodiment. A user is greeted by an animated agent 2100 with a personalized message 2190. The user can select from various activities based on requirements, including travel 2110, household chores 2120, finances 2130 and marketplace activities 2140. Icons 2142 for routine tasks such as e-mail, calendaring and document preparation are also provided to facilitate rapid navigation from one activity to another. Direct links 2146 are also provided to allow transfer of news and other items of interest. Various profiles can be selected based on where the user is located. For example, work, home or vacation. The profiles can be added 2170 as a user requires a new profile for another location. Various items 2180 of personal information are collected from the user to support various endeavors. Moreover, permissions 2150 are set for items 2180 to assure information is timely and current.

Figure 22 illustrates a user main display in accordance with a preferred embodiment.

World 2200 and local news 2210 is provided based on a user’s preference. The user has also selected real estate 2230 as an item to provide direct information on the main display. Also, a different agent 2220 is provided based on the user’s preference.

Figure 23 illustrates an agent interaction in accordance with a preferred embodiment.

The agent 2310 is communicating information 2300 to a user indicating that the user's life insurance needs have changed and pointing the user to the chart that best summarizes the information for the user. Particular tips 2395 are provided to facilitate more detailed information based on current user statistics. A chart 2370 of the user's life insurance needs is also highlighted at the center of the display to assist the user in determining appropriate action. A button 2380 is provided to facilitate changing the policy and a set of buttons 2390 are provided to assist a user in selecting various views of the user's insurance requirements.

Event Backgrounder

An Event Backgrounder is a short description of an upcoming event that is sent to the user just before an event. The Event Backgrounder is constantly updated with the latest information related to this event. Pertinent information such as itinerary and logistics are included, and other useful information, such as people the user knows who might be in the same location, are also included. The purpose of the Event Backgrounder is to provide the most up-to-date information about an event, drawing from a number of resources, such as public web sites and the user's calendar and contact lists, to allow the user to react optimally in a given situation.

Vicinity Friend Finder

This software looks for opportunities to tell the user when a friend, family member or acquaintance is or is going to be in the same vicinity as the user. This software scans the user's calendar for upcoming events. It then uses a geographic map to compare those calendar events with the calendar events of people who are listed in his contact list. It

then informs the user of any matches, thus telling the user that someone is scheduled to be near him at a particular time.

Information Overload

5 The term *information overload* is now relatively understood in both its definition as well as its implications and consequences. People have a finite amount of attention that is available at any one time, but there is more and more vying for that attention every day. In short, too much information and too little time are the primary factors complicating the lives of most knowledge workers today.

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The first attempts to dynamically deal with information overload were primarily focused on the intelligent filtering of information such that the *quantity* of information would be lessened. Rather than simply removing random bits of information, however, most of these approaches tried to be intelligent about what information was ultimately presented to the user. This was accomplished by evaluating each document based on the user's interests and discarding the less relevant ones. It follows, therefore, that the *quality* was also increased.

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Filtering the information is only a first step in dealing with information in this new age.

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Arguably, just as important as the quality of the document is having ready access to it. Once you have entered a meeting, a document containing critical information about the meeting subject delivered to your office is of little value. As the speed of business continues to increase fueled by the technologies of interconnectedness, the ability to receive quality information *wherever* and *whenever* you are becomes critical. This new approach is called intelligent information delivery and is heralding in a new information age.

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A preferred embodiment demonstrates the intelligent information delivery theory described above in an attempt to not only reduce information overload, but to deliver high quality information where and when users' require it. In other words, the system delivers right information to the right person at the right time and the right place.

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Active Knowledge Management System Description

Figure 24 is a block diagram of an active knowledge management system in accordance with a preferred embodiment. The system consists of the following parts: back-end 2400 connection to one or more servers, personal mobile wireless clients (Awareness Machine) 2430, 2436, public clients (Magic Wall) 2410, 2420, web clients 2446, 2448, e-mail clients 2450, 2460.

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Back-end Server (2400) Processes

Figure 25 is a block diagram of a back end server in accordance with a preferred embodiment. The back-end (2400 of Figure 24) is a computer system that has the following software active: Intelligent Agents Coordinator (Munin) 2580, Information Prioritization Subsystem 2530, a set of continuously and periodically running information gathering and processing Intelligent Agents 2500, 2502 and 2504, User Profiles Database 2542 and supporting software, Information Channels Database 2542 and supporting software, communications software 2550, information transformation software 2560, and auxiliary software.

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The Awareness Machine (2446 & 2448 of Figure 24)

The Awareness Machine is a combination of hardware device and software application.

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The hardware consists of handheld personal computer and wireless communications device. The Awareness Machine reflects a constantly updated state-of-the-owner's-world

by continually receiving a wireless trickle of information. This information, mined and processed by a suite of intelligent agents, consists of mail messages, news that meets each user's preferences, schedule updates, background information on upcoming meetings and events, as well as weather and traffic. The Awareness Machine is covered by another
5 patent application.

Figure 26 is a block diagram of a magic wall in accordance with a preferred embodiment.

The Magic Wall

The Magic Wall hardware includes:

- 10 • Computer system 2640 connected to the back-end server
- Sensor array 2634, 2630 and 2632 detects presence, position, and identity of a person
- Large touch-sensitive display 2620
- Sound input 2610 /output 2614 hardware

15 The Magic Wall software supports:

- Multimedia output compatible with current Web standards
- Speech recognition
- Tactile input
- 20 • Intelligent agents representations in the form of speech-enabled animated characters

The Magic Wall operates as follows:

1. If a user appears in the vicinity of Magic Wall, the sensor array triggers "user here" event that sends an environmental cue containing the person's id and the location to
25 the Intelligent Agent Coordinator.
2. User is identified based on the information returned by the sensor array.

3. The Magic Wall switches to “locked on the user” mode. If another user approaches, the system will notify him or her that it cannot serve another user while the current user is being served.
4. Intelligent Agent Coordinator is notified about the user presence.
- 5 5. The Intelligent Agent Coordinator decides if there is pertinent to that user and Magic Wall location time-sensitive information to show (e.g. traffic report, meeting reminder). If such information exists, it is prepared for delivery. If not, control is transferred to the Information Prioritization Subsystem.
6. Information Prioritization Subsystem decides what information is most relevant to the user based on their personal profile, freshness of the information, and the Intelligent Agent Coordinator's prior suggestions.
- 10 7. The page of information identified as the most relevant to the user at this time and place is shown. The act of the information delivery can also include animation and speech output of the intelligent agent representation.
- 15 8. If user desires so, he or she can ask Magic Wall to show a particular page. The Magic Wall recognizes the speech fragment and then identifies and shows the requested page.
9. As the user departs from the Magic Wall area, the sensor array triggers “user left” event.
- 20 10. The Magic Wall switches back to the waiting state.

Other Clients

The Web client is a standard browser navigating to a set of Web pages which allow user to see the same information that is available via the Magic Wall.

- 25 The e-mail client is any standard e-mail program.

Intelligent Agent Coordinator Description

This piece of code is the coordinating agent (or meta-agent) for the Active Knowledge Management system. This means that all communications between the system and each user, as well as communication between the different minion agents are handled

5 (coordinated) by the Intelligent Agent Coordinator. Examples of these minion agents are:

- *BackgroundFinder* - an agent that parses meeting text determining important keywords and phrases and finds background information on the meeting for each user
- *TrafficFinder* - an agent that finds traffic information for each user based on where
- 10 they live
- Several other agents that are responsible for doing statistical analysis of the data in each user's profile and updating fields pertinent to that data

The Intelligent Agent Coordinator 2580 of Figure 25 is also the user's "interface" to the system, in that whenever the user interacts with the system, regardless of the GUI or other

15 end-user interface, they are ultimately dealing with (asking questions of or sending commands to) the Intelligent Agent Coordinator. The Intelligent Agent Coordinator has four primary responsibilities: 1) monitoring user activities, 2) handling information requests, 3) maintaining each user's profile, and 4) routing information to and from users

20 and to and from the other respective agents.

Monitoring User Activities

Anytime a user triggers a sensor the Intelligent Agent Coordinator receives an "environmental cue." These cues not only enable the Intelligent Agent Coordinator to gain an understanding where users' are for information delivery purposes, but also to

25 learn the standard patterns (arrival time, departure time, etc.) of each persons' life. These patterns are constantly being updated and refined in an attempt to increase the system's

intelligence when delivering information. For instance, today it is not uncommon for a person to have several email accounts (work-based, home-based, mobile-based, etc.) as well as several different computers involved in the retrieval process for all of these accounts. Thus, for the Intelligent Agent Coordinator to be successful in delivering
5 information to the correct location it must take into account all of these accounts and the times that the user is likely to be accessing them in order to maximize the probability that the user will see the information. This will be discussed further in another section.

Handling Information Requests

The Intelligent Agent Coordinator handles information requests from other agents in
10 order to personalize information intended for each user and to more accurately reflect each user's interests in the information they are given. These requests will commonly be related to the user's profile. For instance, if an agent was preparing a traffic report for a user it may request the traffic region (search string) of that user from the Intelligent Agent Coordinator. All access to the user's profile data is accessed in this method.

Maintaining User Profiles

User profiles contain extensive information about the users. This information is a blend of user-specified data and information that the Intelligent Agent Coordinator has learned and extrapolated from each user's information and activities. In order to protect the data contained in the profiles, the Intelligent Agent Coordinator must handle all user
20 information requests. The Intelligent Agent Coordinator is constantly modifying and updating these profiles by watching the user's activities and attempting to learn the patterns of their lives in order to assist in the more routine, mundane tasks. The Intelligent Agent Coordinator also employs other agents to glean meaning from each user's daily activities. These agents mine this data trying to discover indications of
25 current interests, long-term interests, as well as time delivery preferences for each type of

information. Another important aspect of the Intelligent Agent Coordinator's observations is that it also tries to determine where each user is physically located throughout the day for routing purposes.

Information Routing

- 5 Most people are mobile throughout their day. The Intelligent Agent Coordinator tries to be sensitive to this fact by attempting to determine, both by observation (unsupervised learning) and from cues from the environment, where users are or are likely to be located. This is certainly important for determining where to send the user's information, but also for determining in which *format* to send the information. For instance, if a user were at
- 10 her desk and using the web client, the Intelligent Agent Coordinator would be receiving indications of activity from her PC and would know to send any necessary information there. In addition, because desktop PCs are generally quite powerful, a full-featured, graphically intense version could be sent. However, consider an alternative situation: the Intelligent Agent Coordinator has received an indication (via the keycard reader next to
- 15 the exit) that you have just left the building. Minutes later the Intelligent Agent Coordinator also receives notification that you have received an urgent message. The Intelligent Agent Coordinator, knowing that you have left the building and having not received any other indications, assumes that you are reachable via your handheld device (for which it also knows the capabilities) and sends the text of the urgent message there,
- 20 rather than a more graphically-oriented version.

Inherent Innovations

- The Active Knowledge Management system represents some of the most advanced thinking in the world of knowledge management and human computer interaction. Some
- 25 of the primary innovations include the following:
- The Intelligent Agent Coordinator as illustrated above.

- The development, demonstration, and realization of the theory of Intelligent Information Delivery
- Support for several channels of information delivery, all of which utilize a common back-end. For instance, if a user is in front of a Magic Wall the information will be presented in a multimedia-rich form. If the system determines that the user is mobile, the information will be sent by to their Awareness Machine in standard text. It facilitates delivery of information whenever and wherever a user requires the information.
- Personalization of information based not only on a static user profile, but also by taking into account history of the user interactions and current real-time situation including “who, where, and when” awareness.
- Utilization of fast and scalable Information Prioritization Subsystem that takes into account Intelligent Agents Coordinator opinion, user preferences, and history of user interactions. It takes the load of mundane decisions off the Intelligent Agents part therefore allowing the agents to be much more sophisticated and precise without compromising the system scalability.
- Speech recognition and speech synthesis in combination with intelligent agent animated representation and tactile input provides for efficient, intuitive, and emotionally rewarding interaction with the system.

Supporting Code in Accordance With A Preferred Embodiment

The following code is written and executed in the Microsoft Active Server Pages environment in accordance with a preferred embodiment. It consists primarily of Microsoft Jscript with some database calls embedded in the code to query and store information in the database.

Intention-Centric Interface

Create an Intention ASP Page ("intention_create.asp")

```
<%@ LANGUAGE = "JScript" %>
<%
5  Response.Buffer = true;
   Response.Expires = 0;
   %>

<html>
10 <head>
    <title>Create An Intention</title>
</head>

<body bgcolor="#FFE9D5" style="font-family: Arial" text="#000000">
15 <%
   //Define some variables

   upl = Server.CreateObject("SoftArtisans.FileUp")
20  intention_name = upl.Form("intention_name")
   intention_desc = upl.Form("intention_desc")

   //intention_name = Request.Form("intention_name")
   //intention_desc = Request.Form("intention_desc")
25  //intention_icon = Request.Form("intention_icon")
   submitted = upl.Form("submitted")
   items = new Enumerator(upl.Form)
   %>
30 <%
   //Establish connection to the database
   objConnection = Server.CreateObject("ADODB.Connection")
   objConnection.Open("Maelstrom")
35  %>

<%
   //Check to see if the person hit the button and do the appropriate thing
```

```
if (submitted == "Add/Delete")
{
    flag = "false"

5    //loop through all the inputs
    while(!items.atEnd())
    {
        i = items.item()

10        //if items are checked then delete them
        if(upl.Form(i) == "on")
        {
            objConnection.Execute("delete from user_intention where
intention_id =" + i);
15            objConnection.Execute("delete from intentions where intention_id ="
+ i);
            objConnection.Execute("delete from tools_to_intention where
intention_id =" + i)
            flag = "true"
20        }
        items.moveToNext()
    }

    // if items were not deleted then insert whatever is in the text field in the
25 database
    if(flag == "false")
    {
        intention_name_short = intention_name.replace(/ /gi,"")
        objConnection.Execute("INSERT INTO intentions
30 (intention_name,intention_desc,intention_icon) values('" + intention_name + "','" +
intention_desc + "','" + intention_name_short + ".gif" + "')")
        Response.write("the intention short name is " + intention_name_short);
        upl.SaveAs("E:development/asp_examples/"+ intention_name_short + ".gif")
    }
35 }

    // Query the database to show the most recent items.
    rsCustomersList = objConnection.Execute("SELECT * FROM intentions")

*>
<input type="Submit" name="return_to_mcp" value="Go to Main Control Panel"
40 onclick="location.href='default.asp'">
```

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```
<tr><td colspan="2"><font face="Arial" size="+1"><b>Enter in a new  
intention</b></font></td></tr>
```

 |

35

```

objConnection.Open("Maelstrom");

    // create query
    intentionsQuery = objConnection.Execute("SELECT * FROM intentions ORDER BY
5 intention_name asc");
    %>

    // write out the options
    <%

    numOptions = 0
10 while (!intentionsQuery.EOF) {
        intentionName = intentionsQuery("intention_name");
        intentionIcon = intentionsQuery("intention_icon");

    %>

15         this.internalArray[<%= numOptions%>] = new Array(2);
        this.internalArray[<%= numOptions%>][0] = "<%= intentionName %>";
        this.internalArray[<%= numOptions%>][1] = "images/<%= intentionIcon

    %>";
    <%
        numOptions++; intentionsQuery.MoveNext();    %>

20 <%    }    %>

    }

    numIntentions = <%= numOptions%>;
    intentionArray = new intentionsList().internalArray;
25 function selectIntention () {
    for (i=0;i<numIntentions;i++) {
        if (IntentionsListSelect.options[i].selected) {
            intentionNameTextField.value = intentionArray[i][0];
            //intentionPicture.src = intentionArray[i][1];
30 break;

        }

    }

    }

</SCRIPT>

35 </HEAD>

<BODY BGCOLOR="<%=Session("main_background")%>" style="font-family: Arial">

40 <CENTER>

```

```
<!-- <FORM NAME="intention_list"> -->
<TABLE FRAME="BOX" border=0 CELLPADDING="2" CELLSPACING="2">

<TR><TD COLSPAN="3" STYLE="font: 20pt arial" ALIGN="CENTER"><B>Add a mySite!
5 Intention</B></TD></TR>

<TR><TD COLSPAN="3">&nbsp;</TD></TR>

<TR>
10 <TD width="100"><font size="-1">Please Select An Intention You Would Like to Add
to Your List</font></TD>
    <TD colspan=2>
        <SELECT ID="IntentionsListSelect" NAME="IntentionsListSelect" SIZE="10"
style="font: 9pt Arial;" onClick="selectIntention()">
15 <%
        intentionsQuery.moveToFirst();
        for(j=0;j<numOptions;j++) { %>
            <OPTION VALUE="<%= intentionsQuery("intention_id") %>" <% if (j ==
0) { %> SELECTED <% } %>>
20 <%= intentionsQuery("intention_name") %>
            <% intentionsQuery.moveToNext()
            }
            intentionsQuery.moveToFirst();
            %>
25 </SELECT>

        </TD>

</TR>
30 <TR><TD COLSPAN="3">&nbsp;</TD></TR>

<TR>
    <TD width="100"><font size="-1">Customize the Intention name</font></TD>
35 <TD COLSPAN=2><INPUT TYPE="text" NAME="intentionNameTextField"
ID="intentionNameTextField" SIZE="30" VALUE="<%= intentionsQuery("intention_name")
%>"></TD>
    </TR>

40 <TR><TD COLSPAN="3">&nbsp;</TD></TR>
```

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5

10

15

25

30


```
while (!intentionsQuery.EOF)
{
%>
5      <TR><TD><a href="javascript:changeIntention('<%=
intentionsQuery("user_intention_id") %>', '<%=numintentions%>')"
onmouseover="mouseOverTab()" onmouseout="mouseOutOfTab()"><font color="Black" face="arial"
size="-2"><%= intentionsQuery("intention_custom_name") %></font></a></TD><TD><IMG
align="right" SRC="images/delete.gif" alt="Delete this intention"
10  onClick="confirmDelete(<%= intentionsQuery("user_intention_id") %>)"></TD></TR>
      <%=numintentions++; intentionsQuery.moveNext(); %>

      <%          }
      Response.Write("<SCRIPT>numintentions="+numintentions
15  + "</SCRIPT>");
      %>
      <tr><td colspan="2"><hr></td></tr>
      <TR><td colspan="2"><a href="javascript:changeIntention('add
...', '<%=numintentions%>');" onmouseover="mouseOverTab()"
20  onmouseout="mouseOutOfTab()"><font color="Black" face="arial" size="-2">add
...</font></a></td></TR>
      </table>

</body>
</DIV>
25  <DIV style="position: absolute; top:0; left:-5; width: 230; height:105; z-index:1; "
onmouseout="intentionlist.style.visibility='hidden'"
onmouseout="intentionlist.style.visibility='hidden'"
onmouseover="intentionlist.style.visibility='hidden'"></DIV>
</DIV>
30  </DIV>
```

While various embodiments have been described above, it should be understood that they have been presented by way of example only, and not limitation. Thus, the breadth and scope of a preferred embodiment should not be limited by any of the above described exemplary embodiments, but should be defined only in accordance with the following

35 claims and their equivalents.